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ABSTRACT

Action learning is receiving increasing attention from human resource development (HRD) practitioners and the HRD management literature. Action learning has been characterized as follows: (1) working in small groups to take action on meaningful problems while seeking to learn from having taken the specified action lies at the foundation of action learning; (2) learning through a cyclical process of taking action, consciously reflecting on that action, drawing conclusions from this reflection, and taking revised subsequent actions; and (3) using learning coaches to help guide the process of action and reflection while refraining from giving specific advice. The following distinct approaches to action learning have been identified: tacit school; scientific school; experiential school; and critical reflection school. When implementing action learning, practitioners are typically confronted by the following three dilemmas: (1) "weathering" the disorientation learners often feel when first exposed to action learning; (2) "trade-offs" in project design; and (3) resistance to action learning. Six strategies for overcoming these dilemmas are as follows: (1) providing patient and artful coaching; (2) using observations and reflective questions; (3) choosing action learning group participants carefully; (4) empowering action learning teams to identify solutions and act on problems submitted to them; (5) ensuring team diversity; and (6) allowing time for learning and learning coaching. (Contains 40 references.) (MN)

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Inquiring into the Dilemmas of Implementing Action Learning – Innovative Session

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This paper provides a basis for an innovative session inquiring into selected dilemmas of implementing action learning: the disorientation learning frequently experience on entering action learning programs; trade-offs among program design options; and dealing with organizational resistance. The session will be highly participative.

Key Words: Action Learning, Design, Implementation

This paper provides an introduction to the an innovative session, the purpose of which is to foster dialogue within the context of theoretical models derived from empirical research between participants and five scholars in a panel who espouse different models for conceptualizing Action Learning. The research on which this panel is based is not, in and of itself, new. However, the session will make a contribution to scholarly dialogue and to advancing the group's understanding of theory-practice issues around the research. Both the panel and attending participants will be invited to build on the theory base by identifying themes from their own practice that confirm, contradict, or augment the insights that these scholars have gained through their own research and practice. We will use practices of skillful conversation and dialogue (Senge, Kleiner, Roberts, Ross, & Smith, 1994, Watkins & Marsick, 1993) that are increasingly used in organizations to help managers make sense of their experience in order to foster a similar mode of sense making in this session. The paper below generally follows the format of the session itself, the template for which is found at the conclusion.

Problem and Research Base

References to Action Learning are increasingly being made in discussions among HRD practitioners and in the HRD and management literatures. Marsick and ONeil (1999) describe differences in Action Learning practice, and compare Action Learning to Action Research, Participatory Action Research, Action Science, Action Inquiry, and Collaborative Inquiry. Marquardt (1999) links Action Learning to organizational learning, as have Marsick and Watkins (1999). Dotlich and Noel (1998) have discussed Action Learning as a method of organizational transformation, and Mumford (1995) discusses Action Learning as a method of management development. Dilworth and Willis (1999) have described Action Learning as an approach for personal development and growth. As more organizations consider Action Learning as a form of management and organization development they encounter several possible obstacles and problems that must be resolved if they are going to experience the potential benefits of this approach. This is not surprising. Most powerful interventions in organizations run counter to the prevailing culture that they are designed to change. However, it is important to share experiences and develop theoretical frameworks to help HRD and organization development practitioners prepare for and overcome these obstacles.

Increasingly, research is being conducted to describe various Action Learning experiences. The research is primarily qualitative in nature, and has resulted in a number of detailed descriptions of the way in which programs

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are conducted (Dennis, Cederholm, & Yorks, 1996; Mumford, 1994; ONeil & Dilworth, 1999), the experiences people have in these programs (Marsick, 1990; ONeil, Marsick, Yorks, Nilson, & Kolodny, 1997; Weinstein, 1995), or the practice of people who design these programs (Pedler, 1996; Marquardt, 1999; ONeil, 1999b). This research base informs the present discussion.

Action Learning Defined (Lyle Yorks, Presenter and Session Moderator)

The term *action learning* has come to mean many different things to people. There are, however, certain common features to various forms of Action Learning that distinguish it from other forms of experience-based learning. The foundation of Action Learning is the notion of working in small groups in order to take action on meaningful problems while seeking to learn from having taken this action. Some authors and researchers explicitly add the notion of learning through a cyclical process of taking action, consciously reflecting on that action, drawing conclusions from this reflection, and taking revised, subsequent actions. In addition, some models of Action Learning advocate the use of learning coaches to help guide this process of action and reflection while refraining from giving specific advice. This concept of learning from real work with the intention of learning distinguishes Action Learning from other forms of active, experiential learning, such as case studies, simulations, or adventure courses that elicit principles that are to be subsequently applied in the organization. For purposes of this paper action learning is defined as "*an approach to working with and developing people that use work on an actual project or problem as the way to learn. Participants work in small groups to take action to solve their problem and learn how to learn from that action. Often a learning coach work with the group in order to help the members learn how to balance their work with the learning from that work*" (Yorks, ONeil, & Marsick, 1999b, p. 3).

Variations of Practice

This definition is broad enough to encompass the major variations of Action Learning being practiced today. A comprehensive analysis of various Action Learning programs by ONeil (1999) led to a typology of four distinct approaches to Action Learning; 1) the tacit school, 2) the scientific school, 3) the experiential school, and 4) the critical reflection school. The tacit school is distinguished by its lack of specific intentionality toward learning. This school assumes that significant learning will take place so long as carefully chosen participants are put together, some team building is done, and information is provided by experts in support of project. Although the program itself is planned, learning is not planned. The learning that does occur is what Marsick and Watkins (1990) have categorized as "incidential" (see for example, Downham, Noel, & Pendergast, 1992; Noel & Charan (1998) for a description of programs that fit this description. The scientific school is rooted firmly in the seminal work of Reg Revans (1970) and the approach is highly rational involving application of the scientific model of problem solving to workplace and social problems. Revans (1978) emphasizes the importance of learning from peers, whom he calles "comrades in adversity," each wrestling with a difficult, seemingly intractable problem. His emphasis is on solving the problem by forming hypotheses and careful experimentation through action to develop "questioning insight." The experience of this kind of program is captured by Preston (1977), an executive who participated in a program based on Revan's approach at General Electric Company (GEC). Proponents of the experiential school base their thinking on Kolb's (1984) experiential learning cycle. Practitioners of this tradition place stronger emphasis than do those in the scientific school on the role of intentional, explicit reflection through the process with a learning coach actively designing practices to this end. Mumford (1993) provides a good introduction to this approach. Practitioners in the critical reflection school share with the experiential school the emphasis on the learning cycle involving explicit reflection. They differ however, in emphasizing a deeper level of reflection that focuses on the underlying premises in the thinking of the participants. This model explicitly challenges participants to examine deep seated assumptions they hold about the organization culture and their own practices as managers. The program described by Dennis, Cederholm, and Yorks (1996) is an example of this type of program.

The typology described above captures the variations of Action Learning interventions that can be seen in contemporary practice. Yorks, ONeil, and Marsick (1999b) have advanced a pyramid model of these types of Action Learning approaches, with the tacit approach at the base of the pyramid, the scientific school the next level, the experiential school the third level, and the critical reflection school the fourth level. They use the imagery of a pyramid to suggest a cumulative ordering of schools in terms of the kinds of learning that are most likely to be produced by each and the outcomes desired by the program. As one goes from the bottom of the pyramid to the top, the learning outcomes that can be achieved become more complex, critical, and contextual. Also, as the intervention

becomes targeted toward outcomes that are more complex, critical, and contextual, more noise is produced in the system and thus potentially more resistance to the process. By noise we mean comments challenging the program as participants are asked to reflect on long-held assumptions, mental models, and issues that have been previously treated as undiscussable. As participants come to revise their assumptions around these issues, and consequently their actions, the larger organizational system is also more likely to push back on the process. Practitioners seeking to implement Action Learning in their organizations can use the pyramid model to make decisions about which model is most appropriate for their organization and the outcomes they wish to achieve (Yorks, Marsick, & ONeil, 1999).

Three Common Dilemmas

When implementing Action Learning practitioners are typically confronted by several dilemmas or issues that must be effectively addressed if they are to have a successful experience. Some of these are common to virtually all Action Learning initiatives, others more peculiar to some of the variations than others. This session addresses three such dilemmas that are relevant to all the variations, although the form and intensity can vary based on both the organizational context and the type of program being implemented. The three are: 1) "weathering" the disorientation learners often feel when first exposed to Action Learning, 2) "trade- offs" in project design, and 3) Resistance to Action Learning.

Weathering the Disorientation Learners Often feel When First Exposed to Action Learning (Lex Dilworth, Presenter)

Most individuals are the products of learning experiences where the learning objectives were set for them, a definitive course outline was provided at the start, and the delivery of learning was by the didactic formal classroom method. Therefore, they have come to anticipate clear structures and boundaries when they engage in new learning opportunities. It can also be comfortable to be passive, looking in on the experience rather than being a part of it. Learning styles can also be in the direction of strong need for structure, a need often reinforced by past experiences in a classroom. As the program design itself challenges the assumptions of participants through reflection and critical reflection, the disorientation potentially becomes more intense.

The action learning experience flows from a different place. It starts with a process, and this in a sense provides some semblance of structure. However, the fundamental focus is learner centered and oriented on adult learning principles. As opposed to the pedagogy that characterizes the K-12 experience (Not to mention some undergraduate programs), participants are asked to think for themselves and have a core stake in shaping learning objectives and strategies. Critical thinking skills are emphasized, as opposed to being handed "predigested" analyses and conclusions that may not fit with present day realities.

What has just been described can be extremely disorienting. It can represent a 180-degree turn from the kind of learning format the learners have come to expect.

Patient, and Artful, Coaching

The best prescription for dealing with this "disorienting dilemma" from the learners perspective--wanting to contribute and be seen as intellectually able to adapt, but with gnawing feelings of self-doubt and discomfiture-- is patience, clear mapping of the general process up front, opportunity to practice true dialogue and questioning inquiry, some coaching in group dynamics skills, and creation of a nurturing and supportive environment within which learning can occur.

Two researched examples demonstrate the value of this supportive coaching. The first involved thirty-one participants from the United States, Australia, and Canada who met in England for an action learning experience (Dilworth & Willis, 1999). All the participants were high level executives, consultants, or entrepreneurs. Early in the process the experience was carefully mapped out and they were given selected writings on action learning from different perspectives to help prepare them for the experience ahead. This helped prepare them for the unfamiliar environment in which they found themselves. In this case, being so far away from their home setting, with office politics three thousand or more miles away, they also found they could be themselves and ask themselves and others fresh question. Initially, this process of questioning was facilitated by the kinds of questions posed by the coaches.

A more complete example of the process of how this dilemma resolves itself through the coaching process describe above involved research into six university based action learning programs. Of the six universities researched that employ action learning, five of them use a facilitator presence up front, and then have the facilitator fade back to a "By invitation only" status in working with the action learning sets. It is a case of "jump starting" the process and then promoting learner independence (A crucible of Adult Learning and Andragogy), rather than encouraging dependency.

The five universities using this strategy are Virginia Commonwealth University, George Washington University, University of Salford (England), University of Ballarat (Australia) and Georgia State University. The University of Texas at Austin has a very robust program that, on the other hand, features a facilitator presence throughout. There are many variations on basic themes that can be effective in action learning.

Commonly, by the third or fourth meeting the action learning set has weathered the disorientation and become comfortable mapping its own routes to learning. Learners can experience what one might call a "freedom to learn", and come to enjoy determination of their own agenda, within deadlines of time and project parameters. Employees are expected to think for themselves, solve problems and isolate the kinds of knowledge required for organizational success, factors that can be related to knowledge management and development of learning organizations.

Observations and Reflective Questions (Victoria Marsick)

Although the program culture may be less disorienting when people voluntarily participate, experience shows that the action learning experience is no less disorienting if the program as been around for a while and participants have at least heard "war stories" of what the experience is like (Dennis, Cederholm, & Yorks, 1996). Action learning programs often fly in the face of both personal capability and organizational norms. The tacit school is less disorienting because coaches are not utilized or their help is sought primarily to manage group dynamics (ONeil, 1999b). Hence, peers may not critically challenge personal beliefs and organizational norms. Questions can be raised around the ethics of helping people to become more self-directed in their learning if the organization is not ready to change its systems and rewards to support them. To what extent is resistance to self-direction tied to command-and-control bureaucracies? Will this resistance disappear given the emergence of a Generation X workforce and/or e-commerce?

"Trade-offs" Among Action Learning Designs (Judy ONeil, Presenter)

As noted above, one of the problems of describing action learning is the variation in types of programs. As a result, discussions and explanations of action learning programs can appear to be describing different, and sometimes contradictory, events. As practitioners read the literature, they see differences in underlying theories and designs—including choice of project, length of the program, choices of participants and content of the program. to name a few. It becomes difficult to sort out the information needed to decide the kind of program that should be designed and implemented. As with any major intervention, one of the first steps that needs to be taken is to determine the needs of the organization and/or the needs of individuals who might be in the program (McNamara, 1996; Weinstein, 1995; Yorks, Marsick & ONeil, 1999). Through a needs assessment, a practitioner can determine that action learning is an appropriate choice, as well as identify objectives for the program and development areas for participants. He or she can then determine what 'kind' of action learning would best meet the needs of the organization and participants.

Design Elements

There are a number of elements of design that can differ dependent on the objectives of the program, the "school" chosen, and the capacity of the organization to invest time and deal with change. Three of the most important choices involve: 1) individual or team projects, 2) the length of the program, and 3) the choice of participants — each member of the action learning group/team has their own project or the entire team works on one project. In either case, many projects have an interested outside sponsor.

Trade-offs between working on individual projects vs. team projects. When participants work on a team project there is usually the intent of working on the project for the development of organizational goals

(Mumford, 1989). Team participants are often not involved in implementation, so while personal development can also be addressed in the design, the focus is on the organization (McGill & Beaty, 1995). When participants have their own individual projects, by contrast, there is a greater intent of learning from the implementation for personal development. With team project work, it can become more difficult to hold the program and team at a high level of learning. The team is in danger of becoming a good and useful task force (Mumford, 1989). When a participant is entirely responsible and at risk in the implementation of solutions to his/her own project/problem, there can be greater focus on the individual through such work as challenging personal assumptions versus organizational norms (Lawrence, 1991).

In either case, good action learning projects generally meet the same criteria. The projects are:

- complex, overarching, and are often cross-functional (ONeil & Marsick, 1994)
- problems, opportunities, or difficulties about which "different reasonable, experienced and honest men would wish to pursue different courses of action ... "Revans, 1978, p. 11); there is no single solution (Weinstein, 1995)
- 'real and alive', meaningful to participants, and about which participants have the motivation to act (McGill & Beaty, 1995; ONeil & Marsick, 1994; Weinstein, 1995)
- familiar or unfamiliar problems that exist in familiar or unfamiliar settings (McNulty, 1979; Revans, 1978; Weinstein, 1995).

Determining the length of the program. The length of programs varies widely (Casey & Pearce, 1977; McGill & Beatty, 1995; ONeil, Arnell & Turner; Noel & Charan, 1992) based on the objectives of the program and the organization or individual's capacity to invest time. There are some parameters, however. In his dissertation work, McNamara (1996)— in a formative evaluation of a team-managed, multi-techniques management development program that included action learning— found that if teams met less frequently than once a month, the participants tended to lose momentum and trust. ONeil (1999a) found that in an evaluation of a program at a public utility teams needed to be able to meet for at least two consecutive days each time they met in order to be able to address both team projects and personal development.

Choosing participants. Programs discussed in the literature show a variety of participants (Cunningham, 1997; Dennis, Cederholm & Yorks, 1996; McNamara, 1996; Yorks, ONeil, & Marsick, 1999a). As with the earlier discussed design elements, participants are usually chosen based on the objectives and intent of the program (Yorks, ONeil & Marsick, 1999b). Participants range from senior level executives to entry-level employees in organizations; to students in academic programs; to social advocates. Once the participants are selected it is important to form groups based on the greatest diversity— including such elements as background, age, gender and nationality. Although not always possible, again depending on the objectives of the program, having volunteer participants in the program is considered to be a good idea (Weinstein, 1995; ONeil & Dilworth, 1999). If the objectives require participation, good preparation of participants, and anticipation of uncertainty and resistance, are important elements of design (ONeil, 1999a ; ONeil & Dilworth, 1999).

Observations and Reflective Questions (Victoria Marsick)

The trade-off between using individual or team projects may be the most pivotal design decision. Individuals tend to have more motivation when they work their own issues (ONeil & Dilworth, 1999). When working individual projects, participants may be more open to interventions from a learning coach because they have "hit the wall" and are frustrated with their own failed efforts. However, programs centered on individual projects are also less likely to provide leverage for organizational change because challenges to the system are not sanctioned by project sponsors (ONeil & Dilworth, 1999). Questions can be raised around the way in which needs assessments are conducted, given the implications of design for individual vs. organizational change. For example, to what extents are needs assessments oriented to knowledge and skill gaps of individuals vs. systems change needs? To what extent are designers driven by a realistic appraisal of the readiness of the system for culture change?

Addressing Resistance to Action Learning in Various Settings (Michael Marquardt Presenter)

There are a variety of ways in which organizations and individuals present obstacles and/or offer resistance to the introduction and implementation of action learning programs in organizations. Below are five ways in which resistance manifests itself along with ways in which they can be addressed. As the amount of "noise" increases as

result of the type of design selected, the level of initial resistance also increases.

Unwillingness of the organization to empower the action learning teams to identify solutions and take action on problems submitted to them. Many managers are unable or unwilling to delegate their power and decision-making to a group that might come up with actions with which they are not fully comfortable. This is a serious problem since it is very difficult to sustain action learning programs when the teams come to recognize that they are merely offering suggestions that are not likely to be implemented by the managers sponsoring the AL program. The potential for this form of resistance is especially strong in the critical reflection schools, as solutions are more likely to challenge the way individuals and/or the organization has been operating. Two ways of dealing with this problem are to 1) engage senior managers in case discussions that highlight the kinds of power they are likely to have to delegate, and 2) select a problem that allows for more incremental learning on their part to adjust to empowering their people. They are not mutually exclusive and both highlight the systemic nature of Action Learning in organizations.

Engaging senior managers through relating case studies from organizations that have successfully used action learning over a number of years is one way of addressing this problem. This can be done in a way that provides for a vicarious experience of what to expect through reasoning through analogy (Neustadt & May, 1986). Marquardt (1999) provides examples of such cases. In selecting cases it is important to provide those that correspond to the type of program being implemented, fit the context of the organization in question, and avoid glossing over the difficulties that might be encountered (Yorks & Whitsett, 1985).

One of the most effective ways of dealing with this problem is to select a problem that is important, but has primarily an internal impact and that can have sufficient time for interim actions for testing. This allows senior managers to learn their way into empowering teams and coming to trust the recommendations and learning of the managers on the teams. This approach also recognizes the systemic nature of the learning that needs to occur--learning among the participants on the teams and learning on the part of managers overseeing the projects.

Inability of the project client/presenter to trust the members of the action learning team to develop solutions for his/her problem. The power of action learning is dependent on the client/presenter truly trusting and counting on the group to assist him/her. If the presenter holds back information and/or lacks commitment to take action, the members will soon lose their interest and energy to help. One way of overcoming such resistance on the part of the client is to allow him or her a "pass" at this session. Let him or her observe how the process works by beginning with another client/presenter in the organization. As he or she sees the successes of fellow colleagues, the resistance might later turn into a keen desire to also take advantage of the power of action learning. Often the earlier resisters turn into the strongest champions once they have had a change to carefully build their level of trust. This is an issue for all four schools of action learning.

Resistance to allowing "outsiders" to be part of the set. Diversity of team members is essential for fresh questions and a wide variety of perspectives. The organization may feel that it takes too much valuable time to help an outsider "catch up" with people already familiar with the problem. This resistance can best be met by providing successful real cases in which outsiders have helped organizations/groups solve their most difficult problems. One such case is the Pizza Man (Marquardt, 1999).

Not allowing time for learning or for a learning coach. Group members may wish to devote all their time on working on the problem, or wish to quickly leave after action steps have been determined. In fact research suggests that there is an inherent tension between time spent working on the project and taking time for reflection and learning (ONeil, Marsick, Yorks, Nilson, & Kolodny, 1997). Of course, not allowing for the learning coach to assist the group in "capturing" the learning would result in losing what is most valuable in the action learning process. This resistance is usually overcome as soon as the learning coach has successfully helped the individual members and the group recognize and reflect on their learning and they see the tremendous benefit of the time spent in "mining the learning." This requires that the learning coach contract clearly with the group around the time he or she will take for structuring reflection and have the strength of personality to hold to that contract. This issue is an important consideration for programs similar to the experiential and critical reflection schools because these programs build in coaching throughout the program.

Some organizations/individuals may be hesitant to share "inside" or "confidential" information with people within and/or outside the organization. This concern can be addressed by establishing a norm that should be part of any action learning group; i.e., any information shared within an action learning session is considered confidential, and may be shared outside the group only with the approval of all members. Without confidence in the confidentiality of the group, clients and members may not be willing to share crucial information that they possess.

One solution to this problem is to explicitly couch the action learning effort in the same framework as a consulting relationship. In fact, this is one of the potential selling points— the opportunity of getting a group very

smart, capable people to examine one's problem. Group members from inside the organization are often high potential members, who are highly motivated by exposure to information not ordinarily available to them. They are also very cognizant of the need to demonstrate their trustworthiness. In action learning designs where people come from outside the organization confidentially agreements can be signed, similar to those commonly signed by external consultants. This, of course, is only necessary where the host organization is uncomfortable having outsiders working in their organization. A good example of an action learning program using people from outside the organization has been presented by Dilworth and Willis (1999).

Observations and Reflective Questions (Victoria Marsick)

Action Learning is an organizational intervention even if it is couched primarily as individual development (Yorks, ONeil, & Marsick, 1999a). As programs move from the tacit to critical reflection schools, the focus is increasingly on the ability of both learning coaches and participants to ask penetrating questions that challenge the system and organization environment (Yorks, ONeil, & Marsick, 1999b). Individuals who gain these skills are less satisfied with the status quo. Team projects surface conflicts that are organizational as well as personal. Given that action learning programs often enter the organization through human resource departments, questions can be raised around access to top management and their willingness to engage the action learning process in a meaningful way. To what extent are consultants advising on the design of action learning programs working with the entire system . To what extent are learning coaches prepared for, and sensitive to, the risks of managing groups and systems in transition?

Continuing the Conversation and Building New Insight (Lyle Yorks, Moderator)

The narratives above, contributed by members of the panel, summarize a significant part of the knowledge base from research and experience in implementing action learning. The purpose of this session is to build on these insights through dialogue and skillfull conversation among the panelists and others participating in the session. New observations will be captured and distributed. The process of skillfull conversation involves a process of first pursuing questions of clarification to insure understanding and second facilitating a balance of advocacy and inquiry (Watkins & Marsick, 1993) in order to facilitate useful dialogue that allows specific issues to emerge. To insure a successful process the moderator will strictly enforce the guidelines presented at the session and adhere to the timeline: Introduction to the session, guidelines and definitions (Moderator) 5 Mins.

First issue framing: "Weathering" the disorientation learners often feel when first exposed to Action Learning	5 Mins.
Panel response	9 Mins.
General audience conversation	10 Mins.
Second issue framing: "trade-offs" in project design	5 Mins
Panel response	9 Mins.
General audience conversation	10 Mins.
Third issue framing: Addressing resistance to Action Learning in various settings	5 Mins.
Panel response	9 Mins.
General audience conversation	10 Mins.
Closing panel comments: Issues and questions inquiry	10 Mins.

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